Electronic Military Evaluations: Training Package

Section 3: Evaluation Processing

Training Modules:

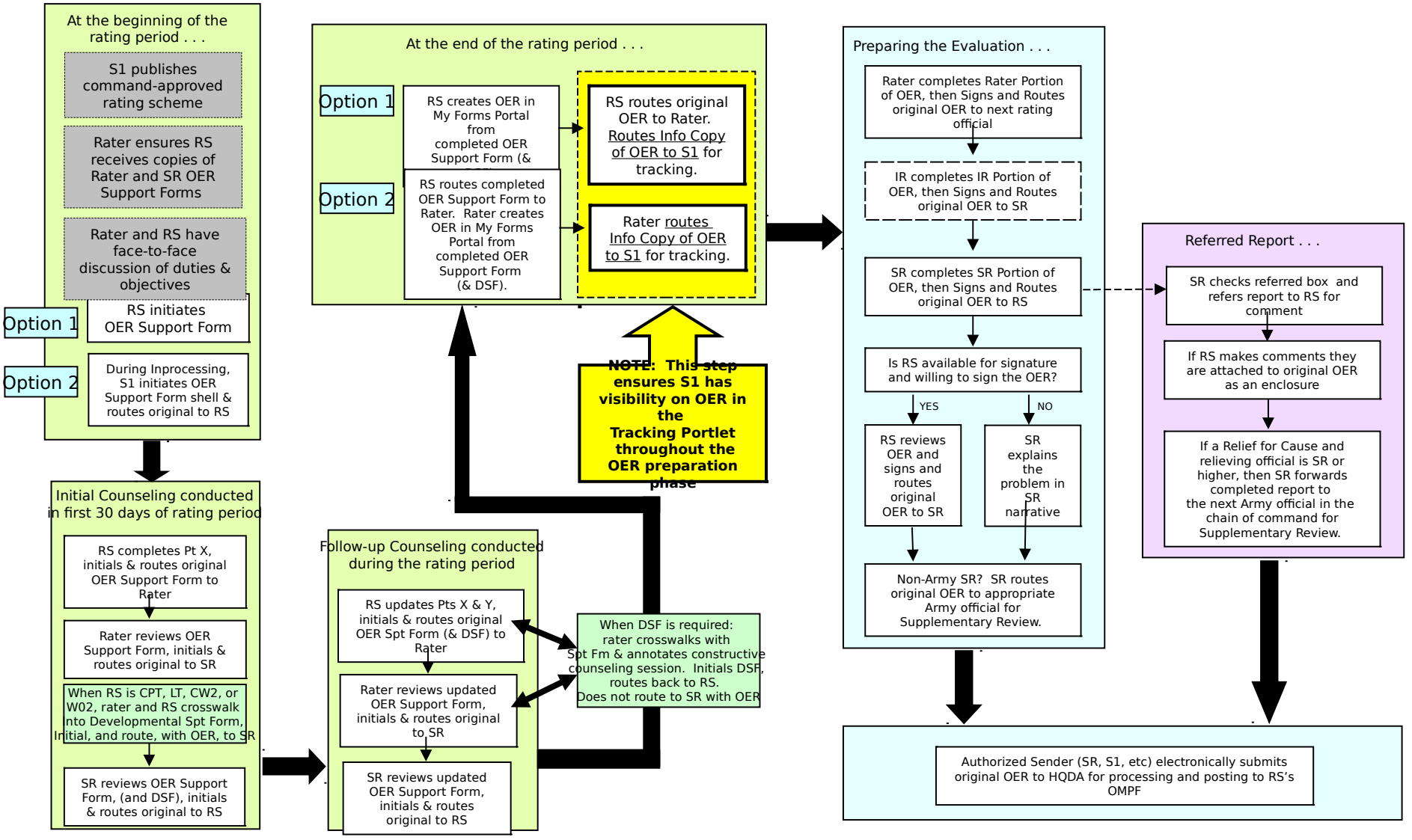
Section 1: Overview
Section 2: Changes in Evaluation Policy
Section 3: Changes in Evaluation Processing
Section 4: FCMP Portal Functions
Section 5: FCMP Evaluation Forms
Section 6: What does this version NOT have?
Section 7: Special issues
Section 8: Things to think about for a unit SOP/unit user manual
Section 9: AKO “My Forms” & Daily Business

AKO My Forms Portal
valuations Business Process - Officers

LEGEND

RS Rated Soldier
IR Intermediate Rater
SR Senior Rater

Action in My Forms Portal
Action offline


At the beginning of the rating period . . .
S1 publishes command-approved rating scheme
Rater ensures RS receives copies of Rater and SR OER Support Forms
Rater and RS have face-to-face discussion of duties & objectives
Option 1
RS initiates OER Support Form
Option 2
During Inprocessing, S1 initiates OER Support Form shell & routes original to RS
Initial Counseling conducted in first 30 days of rating period
RS completes Pt X, initials & routes original OER Support Form to Rater
Rater reviews OER Support Form, initials & routes original to SR
When RS is CPT, LT, CW2, or W02, rater and RS crosswalk into Developmental Spt Form, Initial, and route, with OER, to SR
SR reviews OER Support Form, (and DSF), initials & routes original to RS
Follow-up Counseling conducted during the rating period
RS updates Pts X & Y, initials & routes original OER Spt Form (& DSF) to Rater
Rater reviews updated OER Support Form, initials & routes original to SR
SR reviews updated OER Support Form, initials & routes original to RS
When DSF is required: rater crosswalks with Spt Fm & annotates constructive counseling session. Initials DSF, routes back to RS. Does not route to SR with OER
NOTE: This step ensures S1 has visibility on OER in the Tracking Portlet throughout the OER preparation phase
At the end of the rating period . . .
Option 1
RS creates OER in My Forms Portal from completed OER Support Form (&
Option 2
RS routes completed OER Support Form to Rater. Rater creates OER in My Forms Portal from completed OER Support Form (& DSF).
RS routes original OER to Rater. Routes Info Copy of OER to S1 for tracking.
Rater routes Info Copy of OER to S1 for tracking.
Preparing the Evaluation . . .
Rater completes Rater Portion of OER, then Signs and Routes original OER to next rating official
IR completes IR Portion of OER, then Signs and Routes original OER to SR
SR completes SR Portion of OER, then Signs and Routes original OER to RS
Is RS available for signature and willing to sign the OER?
YES
NO
RS reviews OER and signs and routes original OER to SR
SR explains the problem in SR narrative
Non-Army SR? SR routes original OER to appropriate Army official for Supplementary Review.
Referred Report . . .
SR checks referred box and refers report to RS for comment
If RS makes comments they are attached to original OER as an enclosure
If a Relief for Cause and relieving official is SR or higher, then SR forwards completed report to the next Army official in the chain of command for Supplementary Review.
Authorized Sender (SR, S1, etc) electronically submits original OER to HQDA for processing and posting to RS's OMPF

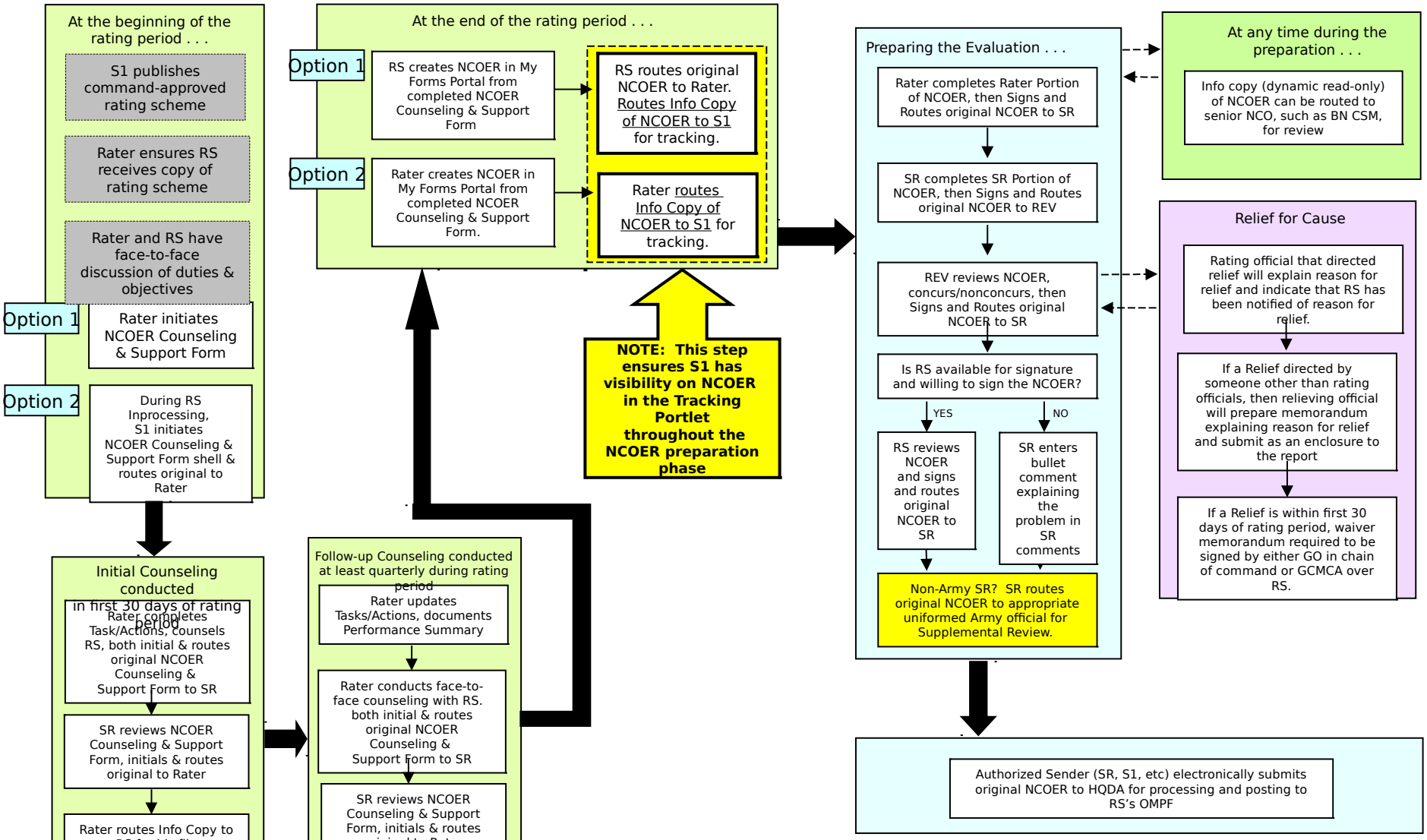
S1 tracks OER status using Tracking Portlet in AKO My Forms Portal.

AKO My Forms Portal
Evaluations Business Process - NCOs

LEGEND

RS Rated Soldier
SR Senior Rater
REV Reviewer

Action in My Forms Portal
Action offline


At the beginning of the rating period . . .
S1 publishes command-approved rating scheme
Rater ensures RS receives copy of rating scheme
Rater and RS have face-to-face discussion of duties & objectives
Option 1
Rater initiates NCOER Counseling & Support Form
Option 2
During RS Inprocessing, S1 initiates NCOER Counseling & Support Form shell & routes original to Rater
Initial Counseling conducted in first 30 days of rating period
Rater completes Task/Actions, counsels RS, both initial & routes original NCOER Counseling & Support Form to SR
SR reviews NCOER Counseling & Support Form, initials & routes original to Rater
Rater routes Info Copy to RS for his file
Follow-up Counseling conducted at least quarterly during rating period
Rater updates Tasks/Actions, documents Performance Summary
Rater conducts face-to-face counseling with RS. both initial & routes original NCOER Counseling & Support Form to SR
SR reviews NCOER Counseling & Support Form, initials & routes original to Rater
At the end of the rating period . . .
Option 1
RS creates NCOER in My Forms Portal from completed NCOER Counseling & Support Form
RS routes original NCOER to Rater. Routes Info Copy of NCOER to S1 for tracking.
Option 2
Rater creates NCOER in My Forms Portal from completed NCOER Counseling & Support Form.
Rater routes Info Copy of NCOER to S1 for tracking.
NOTE: This step ensures S1 has visibility on NCOER in the Tracking Portlet throughout the NCOER preparation phase
Preparing the Evaluation . . .
Rater completes Rater Portion of NCOER, then Signs and Routes original NCOER to SR
SR completes SR Portion of NCOER, then Signs and Routes original NCOER to REV
REV reviews NCOER, concurs/nonconcurs, then Signs and Routes original NCOER to SR
Is RS available for signature and willing to sign the NCOER?
YES
NO
RS reviews NCOER and signs and routes original NCOER to SR
SR enters bullet comment explaining the problem in SR comments
Non-Army SR? SR routes original NCOER to appropriate uniformed Army official for Supplemental Review.
At any time during the preparation . . .
Info copy (dynamic read-only) of NCOER can be routed to senior NCO, such as BN CSM, for review
Relief for Cause
Rating official that directed relief will explain reason for relief and indicate that RS has been notified of reason for relief.
If a Relief directed by someone other than rating officials, then relieving official will prepare memorandum explaining reason for relief and submit as an enclosure to the report
If a Relief is within first 30 days of rating period, waiver memorandum required to be signed by either GO in chain of command or GCMCA over RS.
Authorized Sender (SR, S1, etc) electronically submits original NCOER to HQDA for processing and posting to RS's OMPF

S1 tracks NCOER status using Tracking Portlet in AKO My Forms Portal.